Remote IMS Signon/Signoff

Signon:

- In order to use IMS, the user must have a validated User-ID. To obtain a User-ID the Access Services Request Form must be completed.
- When "The University of Georgia IBM Services" window is displayed enter "F" for Financial and Student Systems and press the <ENTER> key.
- The User_ID will be validated by IMS through the IMS security signon facility. The user's personal id and password must be keyed. After the <ENTER> key is pressed, the message "Congratulations! You are signed on to IMS" will be displayed.
- Press <ENTER> to display the Administrative Information Systems menu.
- The user is now ready to access one of the information systems displayed on the menu. Select the Budget System by positioning the cursor on the dash to the left of "Budget System" and pressing the <ENTER> key.

Signoff:

- A session may be ended in either one of two ways, both of which successfully ends the IMS conversation in progress.
  - Key "699" in the transaction code (TRX) field on the top of the screen. Press <ENTER> two times. Press "F3" to quit. Press "F3" to exit IMS.
  - Clear the screen. Key "/EXIT" and press <ENTER>. Key "/RCL".

Transaction Selection

Select Application

- Place cursor on "Budget Amendment" and press the <ENTER> key.

Primary Option Menu:

The Primary Option Menu is used to select the type of processing that will be performed. The following data may be entered on this screen:

- **OPTION** - must be entered
  - **C** - Session Termination
  - **D** - Standard Processing
  - **F** - Project/Group Switch (change to another application)
- **MODE** - must be entered
  - **3 - Delete**
  - **4 - Add**
  - **5 - Update**
  - **6 - Retrieve**
- **IDENTIFIER** - optional from Primary Option Menu

  Indicates the type of data to be processed.

  If omitted, all eligible IDENTIFIERS for the selected MODE will be displayed on the Secondary Option Menu screen.

  Valid IDENTIFIERS and their descriptions are included in later sections.

Secondary Option Menu:

The Secondary Option displays a list of transactions IDENTIFIERS to which the user is authorized. A transaction selection may be made from this screen.

Secondary Key Selection:

- If the entire key required to access a particular IDENTIFIER is not known, the terminal operator may enter as must of the key as is available followed by a “greater” than” symbol (>). Data whose key values are greater than or equal to the partial key. This operation is called “browsing”.
- When more than one data record meets the key criteria entered, a Secondary Key Selection screen offers the terminal operator the opportunity to select a particular target for processing. The selection is made by keying the “selection number” shown at the left of the screen into SELECTION and pressing the <ENTER> key.

Special Options

F - Page Forward

- Automatically displayed in OPTION when more secondary key selection items exist than can be displayed on one screen.
- Pressing the <ENTER> key will cause another screen of such items to be displayed.
- When no additional screens of data exist, the “F” will no longer appear in OPTION.

R - Return:

- Returns to 1st Secondary Key Select Screen when browsing.
- Returns to 1st occurrence of repeating items on a target screen a indicated in KEY field.

M - More:

- Can be entered when the last Secondary Key Selection screen is displayed.
- Causes another screen of repeating occurrences of an item to be displayed. This is used in conjunction with the R OPTION on a target screen.

N - Next Item:

- Causes the next occurrence of the same screen type (IDENTIFIER) to be displayed

X - Display Secondary Key Selection Screen:

- When positioned on a “target” screen, causes the associated “selection” screen to be displayed.

S - Save Data Entered in Add Mode (4):

- Used in data entry applications to cause keyed data to remain on the screen; i.e., available for use on the next “target” screen. The “S” option only works in ADD mode (4)

? - Help Information:

- Display any help information available for this screen.

Processing OPT, TRX, KEY and ACTION:

Each application or “target” screen will contain three common elements that may be modified by the terminal operator to proceed directly to another screen.

OPT - Option used to direct processing

TRX - Transaction code (3 characters)

- First character contains the MODE discussed in Primary Option Menu
- Second and third characters contain the IDENTIFIER discussed in Primary Option Menu.

KEY - Key of data currently displayed or to be displayed

ACTION - Only used with multiple page display screens

- Normally not modified by the terminal user
- Special ACTIONS
- **E** - forces early completion of input (or use PF4)
- **R** - causes a return to page 1 of the display

Valid IDENTIFIERS, descriptions, and required KEY data are included in later sections.

Budget System Transactions

Line Item Budget Position Access - The following transactions are primarily used to view Line Item Budget Positions.

LI - Line Item Position ... used to access Line Item Budget Positions

- Position status, incumbent, salary, salary supplement, as well as original and amended budget/EFT information is displayed.
- This screen is especially useful in viewing the same position (home department, short title, position number) across fiscal years and occurrences (A, B, C, etc.).

LP - Line Item Position by Fiscal Year - Comprehensive Format --- used to access Line Item Budget Positions for a specified Fiscal Year.

- Position status, incumbent, salary, as well as amended budget/EFT and actual expense information is displayed for up to 9 account/objects.
- The NEXT PAGE Function Key (F9) may be used to look beyond the 9th account/object.
- The LP screen is a composite of several other screens and, therefore, presents an abbreviated version of the position information available.

LF - Line Item Position by Fiscal Year --- used to access Line Item Budget Positions for a specified Fiscal Year.

- Position status, incumbent, salary, salary supplement, as well as original and amended budget/EFT information is displayed.
- This screen is especially useful in viewing positions within the same fiscal year.
- Multiple annual salaries for a fiscal year may be viewed from this screen.

LN - Line Item Position by Name --- Comprehensive Format ... used to access Line Item Budget Positions accessing the information via the incumbent's name (last, first, etc.).

- Position status, incumbent, salary, as well as amended budget/EFT and actual expense information is displayed for up to 9 account/objects.
- Any position in which the incumbent name is blank cannot be accessed via the LN screen (vacant, lump sum, etc.)
- The NEXT PAGE Function Key (F9) may be used to look beyond the 9th account/object.
- The LN screen is a composite of several other screens and, therefore, presents an abbreviated version of the position information available.

LS - Line Item Position by Social Security Number - Comprehensive Format to access Line Item Budget Positions accessing the information via the incumbent's employee number (social security number).

- Position status, incumbent, salary, as well as amended budget/EFT and actual expense information is displayed for up to 9 account/objects.
- Any position in which the incumbent social security number is blank cannot be accessed via the LS screen (vacant, lump sum, etc.)
- The NEXT PAGE Function Key (F9) may be used to look beyond the 9th account/object.
- The LS screen is a composite of several other screens and, therefore, presents an abbreviated version of the position information available.

AO - Account/Object ... used to access supporting account/objects for a particular line item budget position, fiscal year, and occurrence. The budget, encumbrance, and actual expense for the position is displayed. (AO is subordinate to LI).

LD - Personal Services Document ... used to access Personnel Report/Budget Amendment documents that have amended a position and account/object during the fiscal year. (LD is subordinate to AO).

SL - Salary ... used to access all salary occurrences defined for a particular line item budget position, fiscal year, and occurrence. The amount and effective dates of the salary are displayed.

SS - Salary Supplement ... used to access all salary occurrences defined for a particular line item budget position, fiscal year, and occurrence. The type of supplement as well as its amount and effective dates are displayed.

Account/Object/Budget Position Access:

The following transactions are primarily used to view Budget Positions from an Account/Object perspective.

AM - Account and Authorized Objects ... used to access account numbers, authorized object codes, their effective dates, and related information.

OT - Summary or Budgeted Object Totals ... used to access, by fiscal year, dollar totals for a particular budgeted object code. Original, approved, and pending budget as well as actual expense, and encumbrance amounts are available in fiscal year-to-date, current period, fiscal year beginning, and project life classifications.

ND - Non-Personal Services Document ... used to access Personnel Report/Budget Amendment documents that have amended an account and non-personal services object code for the fiscal year. (ND is subordinate to OT).

OP - Budgeted Position Totals ... used to access by account, fiscal year, and object, dollar totals for a particular budgeted position and occurrence.

- Original, approved, and pending objects as well as actual expense, and encumbrance amounts are displayed for the object in total and for the position specifically.
- The position information also includes a similar breakdown of EFT.

OR - Budget/Payroll Interface Rejected Transactions ... used to access and update (correct) actual payroll expenditure transactions that could not be applied to the line item budget after the last payroll.

- The rejected transaction (payroll JV) reference number, description, amount, employee number (social security number), employee name abbreviation, budget position, and check number are displayed.

O1 - Budget/Payroll Interface Rejected Transactions by Position ... used to access and update (correct), by Budget Position, actual payroll expenditure transactions that could not be applied to the line item budget after the last payroll.

- The rejected transaction (payroll JV) reference number, description, amount, employee number (social security number), employee name abbreviation, budget position, and check number are displayed.
- The budget position, social security number, and name abbreviation may be corrected online (to be applied to the budget after the next payroll).

O2 - Budget/Payroll Interface Rejected Transactions by Social Security Number ... used to access and update (correct), by Social Security Number, actual payroll expenditure transactions that could not be applied to the line item budget after the last payroll.

- The rejected transaction (payroll JV) reference number, description, amount, employee number (social security number), employee name abbreviation, budget position, and check number are displayed.
- The budget position, social security number, and name abbreviation may be corrected online (to be applied to the budget after the next payroll).

Personnel Report/Budget Amendment Document Maintenance:

The following transactions are primarily used to view Personnel Report and Budget Amendment Documents processed and to be processed by the system.

DC - Document ... used to view and correct document header information, including the source and nature of the document as well as its budget and EFT totals.

PR - Personal Information ... used to view and correct personal information from a Personnel Report: name, SSN, etc, etc. (PR is subordinate to DC).

PA - Payroll Authorization ... used to view and correct detailed information from a Personnel Report concerning authorized rates of pay. (PA is subordinate to PR).

PU - Purpose ... used to view and correct information from a Personnel Report that specifies the purpose of the document (PU is subordinate to PR).

PL - Position Information ... used to view and correct information from a Budget Amendment about a budget position: position, title, job class, annual rate, etc. (PL is subordinate to DC).

DS - Salary Supplement ... used to view and correct information from a Budget Amendment about a salary supplement associated with a budget position (DS is subordinate to PL.)

AF - Amendment/Funding Source ... used to view and correct information from a Budget Amendment about changes to budget and EFT as well as offsetting entries to account for the source or destination of funds. (AF is subordinate to DC.)

DX - Document by Name... the name from the PR segment is used.

DY - Document by Position... the position from the PL segment is used.

DZ - Document by SSN... the SSN from the PRL segment is used.

Organizational Structure Maintenance:

The following transactions are primarily used to maintain the University's Organizational Structure tables.

OM - Major Organizational Unit ... used to access, update, or create Major Units within the Organizational Structure (President, Vice President, etc.) and associate each with its subordinate units.

OI - Intermediate Organizational Unit ... used to access, update, or create Intermediate Units within the Organizational Structure (Colleges, Divisions, etc.) and associate each with its subordinate units (departments).

OD - Department within Organizational ... used to access, update, or create Departments within the Organizational Structure.

DD - Department ... used to access, update, or create Departments and their associated sort sequence and original budget page numbers.

BW - Budget Workers ... used to access and update the Budget Analyst and Budget Assistant assigned to each department as well as a contact person located in the department and its college or division.

FN - Fund or Budgetary Unit ... used to access, update, or create Budgetary Units within the Organizational Structure of the University. A current amendment number field is associated with each budgetary unit. This amendment number will be used by the system to report the proper amendment number for each unit to the Board of Regents.

Authorized Transaction Table

ID	TRANSACTION	KEY DATA REQUIRED
LP	Line Item Position by FY (Comprehensive)	FY/Home Dept/Short Title/Position No/ Occurrence Code
LF	Line Item Position by FY	FY/Home Dept/Short Title/Position No/ Occurrence Code

LS	Line Item Position by SSN	Incumbent SSN + “greater than”
LN	Line Item Position by Name	Incumbent Name (last/first/mid/suf) + “greater than”
LI	Line Item Position	Home Dept/Short Title/Position No/Fiscal Year/Occurrence Code
AO	Line Item Account/Object	Home Dept/Short Title/Position No/Fiscal Year/Occurrence Code
LD	Line Item Account/Object Document	Home Dept/Short Title/Position No/Fiscal Year/Occurrence Code
SL	Line Item Salary	Home Dept/Short Title/Position No/Fiscal Year/Occurrence Code
SS	Line Item Salary Supplement	Home Dept/Short Title/Position No/Fiscal Year/Occurrence Code
AM	Account	Account Number
OT	Budgeted Object	Account Number/Fiscal Year/Object
ND	Account/Object Document	Account Number/Fiscal Year/Object
OP	Budgeted Position	Account Number/Fiscal Year/Object
OR	Budget/Payroll Rejects	Account Number/Fiscal Year/Object
O1	Budget/Payroll Rejects (by Position)	Home Department/Short Title/Position No/ Occurrence Code + “greater than”
O2	Budget/Payroll Rejects (by SSN)	Incumbent SSN + “greater than”
DC	Document Header	Fiscal Year/Document Number
PR	Personnel Report Information	Fiscal Year/Document Number
PA	Payroll Authorization Information	Fiscal Year/Document Number
PU	Purpose of Document	Fiscal Year/Document Number
PL	Position Information	Fiscal Year/Document Number
DS	Salary Supplement Information	Fiscal Year/Document Number
AF	Amd/Fund Source Information	Fiscal Year/Document Number
DX	Document by Name	Incumbent Name + “great than”

DY	Document by Position	Home Department/Short Title/Position No/ Occurrence Code + “greater than”
DZ	Document by SSN	Incumbent SSN + “greater than”
OM	Major Unit	Major Unit Code
OI	Intermediate Unit	Major Unit/Intermediate Unit Code
OD	Department (in Org)	Major Unit/Intermediate Unit Code/ Department Number
DD	Department	Department Number
BW	University Sr Budget Analyst and University Budget Analyst	Department Number
FN	Fund/Budgetary Unit	Budgetary Unit Number